Transformative Learning and Adult Education

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Assignment

### *Developmental Readings*

Create Developmental Readings from seminal sources and scholarly peer-reviewed journal articles. Review the instructions for Assignment #3, the course essential elements, and course readings to identify selections of books and journals to create entries.

a. Refer to the "Student Guide to Developmental Readings" in the General Helps folder for updated information on sample comments, the grading rubric, and key definitions related to developmental readings.

**Source One:** Backfish, E. H. P. (2021). Transformative learning theory as a hermeneutic for understanding tensions within scripture. *Christian Scholar’s Review*, *50*(3), 281–295. <https://www.proquest.com/docview/2526908687/abstract/1E5352DCDF0D4DA3PQ/15>

**Comment 1:**

**Quote/Paraphrase:** “First, TLT is about change. Mezirow defines it as “the process of effecting change in a frame of reference” (emphasis original). Second, this change is often precipitated by a “disorienting dilemma.” Such dilemmas are often conflicts between what the learner originally thought to be true and what the learner is experiencing in the present. When one’s assumptions and experience do not match, or when one’s prior understanding conflicts with new knowledge, the learner is forced to reevaluate the evidence in order to make sense of the subject.” (Backfish, 2021, p. 282) “This phenomena is much like Thomas Kuhn’s idea of “paradigm shifts” in science introduced just a decade before Mezirow’s theory…Kuhn argued that science did not advance in a linear way with the simple accumulation of more knowledge. Rather, it advanced through a series of “revolutions” which changed the scientific community’s perspective (or paradigm) on a given theory or idea. Similarly, TLT does not involve a linear accumulation of new knowledge, but a series of “revolutions” in understanding.” (p. 283)

**Essential Element:** This comment is associated with the essential elements andragogy and Transformative Learning Theory.

**Additive/Variant Analysis:** This comment is additive to my understanding of adult learning as a transformation and refinement of frameworks of understanding. The importance of a “disorienting dilemma” was not previously fully appreciated by myself even though I have had my share of such experiences. Also valuable is the recognition that this process is operative not just on the individual level but also on a cultural and systemic level.

**Contextualization**: Though the term “systems” is not present here, there is much present in these observations valuable to understanding human learning from a systems perspective. Learning does not take place in a vacuum but within the web of interconnections between people and organizations of people from small groups to nation-states and cultures. This insight also fits well with the insights from the field of hermeneutics and the hermeneutical circle where understanding is expanded and modified through multiple encounters with a text. The emphasis on “one’s prior understanding:” being brought to the table is an essential process in understanding and learning as seen in Gadamer. As we mature and hold certain understandings for some time, it is reasonable to conclude that a “disorienting dilemma” would be necessary for new learning and understanding. As a transitional specialist in pastoral leadership often working with congregations who are stuck or experiencing crisis, a focus on understanding the “disorienting dilemma” and leveraging it for more productive learning and growth could prove to be a valuable resource.

**Comment 2:**

**Quote/Paraphrase**: (see next page)

**A close-up of a chart

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**Essential Element:** This graphic is associated with the essential element of Transformative Learning Theory and andragogy.

**Additive/Variant Analysis:** This material is additive to my understanding of adult learning. The author is laying out a comparison of four approaches to adult learning. The general flow of an adult learning process begins with encountering new information, often disruptive information. This leads to critical reflection as one wrestles with the new information and its incongruence with one’s existing worldview. This may lead to an adoption or synthesis of the new information with one’s old view with a range of potential changes and the potential for impact not only on one’s beliefs but also on one’s actions. Well taken is that not only are we discussing the integration of new information and the potential formation of a changed worldview, but also the importance and likelihood that adults will assess or try out the new framework for validity.

**Contextualization:** In my research, I hope not only to come to a better and conscious understanding of how I learn and adapt to new information encountered through formal education and life experience but how as a church leader, often working with churches in crisis and stagnation, I may utilize these insights to more effective leadership of congregations. An understanding of how adults learn, specifically adult Christians, provides additional tools for helping congregations find avenues for growth and productivity through adult learning. Such learning for individuals within a congregation, especially leaders, but not neglecting parishioners, can help congregations already experiencing disruption through “a disorienting dilemma” process this event in a productive and learning way leading to new insight and creative action. For congregations that are stuck, engineering opportunities to experience new information may jumpstart such a process. Many leaders will avoid upsetting the apple cart for fear of creating anxiety and conflict. But this insight suggests that it can be quite beneficial to do so in some cases when the processes and worldview of the congregants are incongruent either with Scripture or productive ministry in their context.

**Comment 3**: “One of the most obvious examples is Job. Job faced a disorienting dilemma when he lost nearly everything dear to him, from his wealth to his children to his own health. Job was not able to reconcile this new experience with what he understood to be true about God. His learning, and the “creating” phase specifically, came through divine revelation. God reframed his question from one about suffering and justice to one about wisdom and trust, and Job was transformed and humbled. Job realized that he had been asking the wrong questions based on his own finitude. Job never learned the reason for his suffering, but he learned something more valuable: how to trust God even in suffering and even when he did not have answers. Ironically and profoundly, that is wisdom” (p. 286)

**Essential Element**: This comment is associated with the essential elements of Transformative Learning Theory and andragogy.

**Additive/Variant Analysis:** This comment is additive to my understanding of adult learning by providing an insightful example unpacking the learning process through the Scriptural story of Job. Here we see Job as an adult traveling through the process of learning through his life experience and relationship with God.

**Contextualization:** This example is helpful on several levels to church leaders. On a personal level, it helps me to consciously recognize the learning I have experienced resulting in adjusting the frameworks with which I navigate life through past “disorienting dilemmas.” It occurs that such conscious examination could raise the question of whether all such modifications are productive and consistent with Biblical truth, as stress and anxiety generated in such experiences could also lead to hyper-negative and critical views of similar experiences and similar people in these experiences. Thus, an encounter with God’s Word and revelation to help with the framing process is a critical element in this process of conscious and critical reflection.

On another level, this example opens a valuable avenue for exploring Biblical stories of people’s encounters with God for teaching and homiletics for as the hearer becomes conscious of how God interacted in the lives of people bringing change, appreciation that all Christians experience this sort of life-transformative learning throughout life can be cultivated.

**Source Two:** Dwyer, C. P. (2023). An evaluative review of barriers to critical thinking in educational and real-world settings. *Journal of Intelligence*, 11(6), 105. https://doi.org/10.3390/jintelligence11060105

**Comment 4:**

**Quote/Paraphrase:** “In the context this example is used, ‘I don’t know’ refers to epistemological understanding. With that, it may also be impacted by bias and emotion. For example, depending on the topic, an individual may be likely to respond ‘I don’t know’ when they do not have the relevant knowledge or evidence to provide a sufficient answer. However, if the topic is something the individual is emotionally invested in or feels passionate about, an opinion or belief may be shared instead of ‘I don’t know’ (e.g., Kahneman and Frederick 2002), despite a lack of requisite evidence-based knowledge (e.g., Kruger and Dunning 1999). An emotional response based on belief may be motivated in the sense that the individual knows that they do not know for sure and simply uses a belief to support their reasoning as a persuasive tool. On the other hand, the emotional response based on belief might be used simply because the individual may not know that the use of a belief is an insufficient means of supporting their perspective– instead, they might think that their intuitive, belief-based judgment is as good as a piece of empirical evidence; thus, suggesting a lack of empirical understanding. With that, it is fair to say that though epistemological understanding, intuitive judgment, emotion, and bias are distinct concepts, they can influence each other in real-world CT and decision-making.” (p.10)

**Essential Element:** This applies to the essential element of andragogy as well as educational taxonomy. It discusses the issue of one’s readiness to learn and presents that a negative emotional response may function as a barrier to learning. Educational taxonomy discusses the importance of comprehension, and this comment suggests that the emotional process can be a defensive barrier to comprehension, sabotaging new understanding.

**Additive/Variant Analysis:** This comment is additive to my understanding of adult learning (andragogy) as well as the process of comprehension/understanding that is discussed in educational taxonomies. Adult learning theories provide the insight that one brings life experiences to the table when encountering new information and experience. This includes not only the factual event, cognitive facts, or even worldview, but also the subconscious emotional evaluation of such. Cognitive science demonstrates that we never encounter new information or experience neutrally, but it is always weighed against our previous memory as our thinking processes seek to identify similar experiences. If such an experience is negative and stressful, the resulting anxiety may well, as this author points out, create an internal barrier to learning. “I don’t know” may be reflective of “I don’t want to know.”

**Contextualization:** While the author here has a demonstrated bias toward empiricism that can be problematic for application within faith-based environments, rather than focusing on a variant analysis, I find his focus on the role of bias and emotion is valuable in not only understanding one’s learning and the barriers that exist within our subconscious toward “variant” material but also helps us to expect resistance to learning in adults may have become quite comfortable with their worldviews. As a pastoral leader and consultant, I often encounter entrenched viewpoints held by congregational leaders who are resistant to change. This article provides a useful insight that such resistance may be more than a generalized resistance to change based on personality traits, or because of a long-held worldview, but could be more specifically tied to prior negative life experiences leading to barriers created by anxiety to new understanding. This comment adds a layer of understanding to something I learned from Peter Steinke who was a specialist in congregational systems. He often spoke of the church as an emotional system and highlighted the role of anxiety. When a person or a congregational system is anxious, there is little willingness or energy for hearing and understanding a rational and reasoned argument, no matter who presents it. The individual seeks only relief from anxiety, often by retreating into existing or former safe territories. While Dwyer is concerned with “the emotional response based on belief” not being a sufficient means for expressing understanding, he is onto something here even if his understanding of it is biased by his orientation toward empiricism. Human beings are not only rational thinking creatures, but we are also feeling creatures and sometimes, perhaps often, feelings get in the way of learning whether it be from experience (empiricism) or from a faith-based perspective informed by God’s Word.

**Source Three:** Jesson, Joce., & Newman, Mike. (2020). Radical adult education and learning. In Griff Foley (Ed.) *Dimensions of adult learning: Adult education and training in a global era* (1st ed.). Routledge. <https://ereader.perlego.com/1/book/1645884/25>

**Comment 5:**

**Quote/Paraphrase:** “Mezirow (1981, 1991) draws on Jürgen Habermas’ analysis of the generation of knowledge, and describes three domains of learning: instrumental, interpretive, or communicative, and critical or emancipatory. Instrumental learning is learning in order to manage and control our environment—to do a job and earn a living, to build things and to manage people when we consider those people as functions and part of the physical environment. In this form we examine and learn about reason and cause and effect. We learn to solve problems by weighing up the options and choosing the most appropriate one. This learning can be complex but is essentially about getting the skills and information necessary to construct systems and devise methods for making those systems work. For radical activists, instrumental learning will provide the skills and information to deal with practical matters, to use existing structures and systems such as governmental and legal processes. But the purpose is always to bring about change, and to challenge social control. Interpretive learning helps us understand the human condition. The focus is on people, what they are and how they relate, on symbolic interaction, on society and social history. We learn to solve problems by exchanging ideas and opinions, through reflection and insight, and by seeking consensus. For social activists, this learning will help in understanding the social context of the problem they are addressing and the character, background, and motives of the people they may be working with as well as those they may be seeking to change. Critical learning helps us understand the psychological and cultural assumptions that constrain the way we see the world and that influence the way we think, feel and act. We learn not only to see the world more clearly but also to see ourselves seeing the world. This learning involves coming to know what ‘makes us tick’, what makes us adopt particular positions, think in particular ways, react and feel the way we do, and take the actions we take. We learn to solve problems through reflection that may transform our whole way of thinking—that may transform our perspectives. In this kind of learning we can learn to see through ourselves and so may be able better to understand others.” (Jessen et al., 2020)

**Essential Element:** This comment is related to the essential elements Transformative Learning Theory as it explains three interactive domains of learning.

**Additive/Variant Analysis:** This comment is additive to my understanding of adult learning. Mezirow’s breakdown of different domains of learning expands understanding of adult learning as more than just accumulating new information or even incorporating new information, but that this incorporation happens in different ways for different purposes.

**Contextualization:** These insights from Mezirow are not only valuable for examining one’s learning but as insight into effective leadership through enabling learning. Pastoral leadership is strongly associated with teaching and learning. Christ’s command which instituted the ministry is predicated on going and teach. (Matthew 28) In ministry, the pastor often exercises leadership in differing contexts. It occurs to me that the most common form of leadership when engaging church leaders functioning in a governmental structure is on the instrumental level, which is seeking to help the leaders solve practical problems by providing insight and practical suggestions, even at times skill building. Only rarely does such teaching and learning elevate to interpretive learning asking congregational leaders to take a step up and consider the human condition of the congregants and the community they seek to serve. Such a focus could serve to expose barriers to and avenues for more effective congregational and community ministry. Even more rare, is encouraging leadership toward critical learning, asking the leaders to examine their preferences and biases, “the psychological and cultural assumptions that constrain the way we see our world.” This is likely due to a fear of encountering resistance and stimulating conflict with church leaders. An approach that is aware of how anxiety generating such a process could be, that is supportive and non-judgmental, that allows the individual to come to insight about his assumptions rather than imposing such insight from the outside, could lead to an additional layer of transformative learning generating empathy for others and more effective congregational and community ministry.

**Comment 6:**

**Quote/Paraphrase: “**Radical action is always a struggle over power. It is a struggle about who should wield power and how it is used. Radical social activists are commonly trying to gain more power for the people they are working with or represent. Often, as in the case of the struggle against the nuclear power industry in Saskatchewan, this struggle is an attempt to redress a gross imbalance of power. Part of the role of radical education, therefore, is to help learners understand the variety of ways in which power can be exercised, whether in localized sites and practices or in large, complex state apparatuses or multinational corporations. And that knowledge itself is socially constructed and situated (Kilgour 2001). Radical education helps provide learners with the tools and information to permit them to arrive at strong political-economic analyses of the organisations, communities, and social structures they are trying to change. It enables activists to broaden their understanding of various kinds of power and to develop the political skills of lobbying, organisation, advocacy, representation, and the like that go with action against that power.”

**Essential Element:** This comment is related to the essential element andragogy.

**Additive/Variant Analysis:** This comment is variant to my understanding of productive and ethical adult learning. The authors here appear to not be incorporating Mezirow’s insights about interpretive and critical learning but have adopted the postmodern, even postliberal, application of adult learning focusing on instrumental learning to exercise power over others.

**Contextualization:** The above statement might seem simplistic given there are plenty of examples of abuse of power in our societies. The authors here echo the narrative of postmodern critical theorists that it is all about power. A common theme within such theories is the non-existence of absolute values that are universal to all people or even to a culture of people. Within these political theories, all that is recognized is the exercise of power following the lead of Marx and Nietzsche and postmodernists such as Derrida and Foucault. As the authors state, “. It is a struggle about who should wield power and how it is used. Radical social activists are commonly trying to gain more power for the people they are working with or represent.” This echoes another theme in postmodern culture, that of tribalism as people unite around particular goals to exercise power to achieve them. What is lacking in radical education is the very insight from Mezirow they had previously written about. Interpretive and critical learning when exercised effectively and genuinely for the sake of serving others should seek to overcome tribalism and self-oriented applications of power with empathy generated by increased understanding. Radical education is not focused on great true genuine empathic understanding of the other, but on gaining insight into the other to subjugate them. Radical education here fails as most radical and critical theories fail from hypocrisy, advocating for the very thing they are critical of, the exercise of power by one group over another.

**Source Four:** Mezirow, J. (2011) Transformative learning theory. In J. Mezirow & E. W. Taylor, *Transformative Learning in Practice: Insights from Community, Workplace, and Higher Education* (1st ed.). Jossey-Bass. https://ereader.perlego.com/1/book/1007063/11

**Comment 7:**

“Quote/Paraphrase: Critical reflection, a distinguishing characteristic of adult learning, refers to questioning the integrity of deeply held assumptions and beliefs based on prior experience. It is often prompted in response to an awareness of conflicting thoughts, feelings, and actions and at times can lead to a perspective transformation (Mezirow, 2000). There are three forms of reflection in the transformation of meaning perspectives: content (reflecting on what we perceive, think, feel, and act), process (reflecting on how we perform the functions of perceiving), and premise (an awareness of why we perceive). (Kreber 2004)…Methods found useful in studying critical reflection of assumptions and discourse include using critical incidents, journal writing, media analysis, repertory grids, metaphor analysis, conceptual mapping, action learning, collaborative learning, and John Peters’s “action-reason-thematic technique” (all are described in Mezirow and Associates, 1990).”

Also: “One view is that I have neglected the role of imagination, intuition, and emotion. This criticism is partially justified. I have noted that the process by which we construe our beliefs may involve taken-for-granted values, stereotyping, selective attention, limited comprehension, projection, rationalization, minimizing, or denial. These considerations are reasons that we need to be able to critically assess and validate assumptions supporting our own beliefs and expectations and those of others. The way we typify persons, things, and events becomes our realities. Expectations may be of events or of beliefs pertaining to one’s own involuntary reaction to events. Our expectations powerfully affect how we construe experience; they tend to become self-fulfilling prophecies. ‘Imagining how things could be otherwise’ (Greene, 1998) is central in the initiation of the transformative process. Because transformation is often a difficult, highly emotional passage, a great deal of additional insight into the role of imagination is needed and overdue.” (Mezirow, 2011)

**Essential Element:** This comment is related to the essential elements of andragogy, Transformative Learning Theory, Educational Taxonomy.

**Additive/Variant Analysis:** Mezirow’s comments here deepen understanding of critical reflection while acknowledging that his emphasis is on a rational cognitive process that would be improved by considering emotive processes as well. Critical reflection is intricately connected to how we understand self-concept as well as the recognition that adults are self-directed learners who prefer to focus on immediate and productive application. Thus, while a disorienting dilemma may lead to self and critical examination of current beliefs, the emotional process of this new learning event may serve not only as a barrier but also as a means for such learning.

**Contextualization:** Mezirow here is suggesting the value of engineering a learning experience so that critical reflection can occur among adult learners. His focus on three forms of reflection is helpful as a leader/teacher who seeks to encourage transformative learning in another, or a group considers how to engineer such a disorienting dilemma. Encouraging a particular form of reflection if taken up by the learning will result in different directions for change. There may be times the leader assesses the primary avenue for change is to focus upon the content of the person/people in question: what they are perceiving, thinking, feeling, or how they are acting. This may provide the ground to lead a person or group into deeper forms of reflection beyond mere content to an understanding of the process informing how they are interpreting a situation or even to premise, a greater awareness of why they are perceiving or focusing on a particular event.

For instance, I am advising a congregation that is consumed with anxiety about a declining and aging population, which sought a transitional specialist to help them grow and fill their pews. There was an absence of awareness that their anxiety was creating not only internal conflict but was counterproductive to creating a welcoming environment. While we have discussed how anxiety gets in the way of facilitating relationships both within the congregation and with people on the outside, these three levels of critical self-reflection may be helpful. Using some of the suggested tools, such as examining critical incidents together, or encouraging the leaders to write about their feelings, may open greater awareness of what they are thinking and feeling and how it impacts their behavior. Perhaps there will be openness for self-directed learning about how they are interpreting their experience and why they are so focused on the potential future closure of their church. As I consider the emotional aspects of their interactions, I wonder if they are projecting their growing sense of personal mortality upon their congregation as a whole. But the insights of andragogy are useful here in reminding me this is a hunch, and if true, something that they will need to discover in their self-examination as it may be a key driving force and it may not be. Often as leaders, we seek to inject insight into the congregational system, which can generate more anxiety and resistance and may color the results, so they are not authentic. Adult learning theories are valuable here especially when a person or a group like a congregation needs transformative change, for such change will only happen if the person/people have buy-in facilitated by learning.

**Source Five:** Vella, J. (2014). *On teaching and learning: putting the principles and practices of dialogue education into action* (1st ed.). Jossey-Bass. <https://ereader.perlego.com/1/book/2765415/>

**Comment 8:**

**Quote/Paraphrase:** “A learning task is an open question put to a small group, with all the resources they need to respond. A learning task is not an activity that follows a lecture to ascertain that the lecture was heard and understood. It is the overarching system that can include inductive work: anchoring of learners in their own context in relation to new content; input that presents the new content as what is added to their learning; implementation tasks that invite learners to apply this new content; and integration tasks that project their use of the new content away from the learning site…Learning tasks done in small groups are a microcosm: this is what society can look like. Here are men and women, working to produce their own theory or skills with ample resources, and a dialogue educator who designed and set the learning task standing by. Here is a small community of earnest learners, focused and committed to hear one another out, to collaborate toward the product: a plan, a context-appropriate theory, a tested skill. There is leadership here. However, it is subtle and moves about from one person to another. There is opposition and there are differences of opinion. However, they are explicit and goodhumored. This is not a description of a promised land. These are the qualities of a small group engaged in a meaningful, well-set learning task. (Vella, 2014, pp. 53-54) “Competition in a small learning group is innate. Learners think: I want to show my skills, and I am moved by your energy and enthusiasm to learn more and produce better. This kind of competition is fully the meaning of the word, whose Latin roots are asking (petition) and with (com). In completing a well-designed learning task, small-group members are constantly “asking with” one another how they can do more and better.” (p. 58)

**Essential Element:** This comment is related to the essential elements of andragogy and educational taxonomy.

**Additive/Variant Analysis:** This comment is additive to my understanding of adult learning expanding the emphasis on self-directed learning from the individual to the group. This highlights the importance in group settings of learning being collaborative and flexible enabled by mutual respect for fellow learners. Leadership in an adult learning environment is more focused on providing an environmental system enabling collaborative and self-directed learning than on imparting information or moving the group to a predetermined location. The leader may set the group to a goal, for example solving a particular problem, but leaves the solution to the group.

**Contextualization:** This short comment from Vella is very well taken as most of my professional work is done in a group setting within the context of a Christian congregation. Even when I am working with individual leaders, the leadership team and the congregation as a whole are part of the landscape. Such “subtle” leadership which allows for the members to exercise leadership, is not simple nor does it come easily or naturally. It can be anxiety-generating for both the leader and the members of the group as they journey toward unexplored territory. Differences of opinion will arise as people tap into individual experience and insight as well as being motivated by their own emotions and biases. As Vella says, natural competition will complicate the matter. But these things can be framed by the leader as difference not necessarily opposition and competition not necessarily conflict by reminding the group we are asking each other how “we can do more better.” Leadership here is important to keep the group focused on learning regarding a particular objective or problem, lest the group dynamics act as winds upon a ship without a rudder driving it to and for with no progress made. But the hand on the rudder needs to be more about keeping a generalized focus so that the experiences and insights in the group can lead to great and new insights. In the end, a congregational system is a voluntary system. One chooses to invest his time and effort into being part of something greater than oneself. People within the congregational system will not adopt transformative change if they do not through their collaborative processes learn the value of such change.

An additional element within a Christian congregational setting is that such learning processes are not just collaborative and self-directed, but also occur in response to the divine insight that comes through God’s Word. Here the pastoral leader has the responsibility not just to encourage mutual collaborative learning and positive interactions, but also when necessary to remind the members of the insights provided from outside our experience by God Himself. These insights serve as a valuable Christian framework and foundation as the Christian congregation is called to serve Christ. Thus, a pedagogic mechanism is not entirely inappropriate in the context of adult learning. It takes wisdom and informed knowledge of God’s Word and congregational systems to know when it is time to speak a “Word of God” to the group to reset the rudder.

**Source Six:** Pearce, L., Hanick, S. L., Hofer, A., Townsend, L., & Hooper, M. W. (2022). Your discomfort is valid: big feelings and open pedagogy. *Knowledge Cultures*, *10*(2), 24–51. <https://doi.org/10.22381/kc10220222>

**Comment 9:**

**Quote/Paraphrase:** Jack Mezirow (1978) first used the term 'transformative learning' to describe learners interrogating, with others, what they encounter in the classroom, leading to a transformation of perspective. When a learning community grapples with the contrasts and contradictions between diverse personal experiences and a body of knowledge, new knowledge can be created, and identities transformed. Rather than transmitting knowledge to students, an instructor facilitates a space for co-creating knowledge…Vygotsky, the founder of social constructivism, introduced an additional concept that is relevant to this discussion: the zone of proximal development, or ZPD, and the related concept of scaffolding. In a nutshell, there is a gap between what learners can do and what they cannot yet do. Learners can accomplish what is in that gap (their zone of proximal development) but only with the support of others. In other words, the ZPD is where learning happens. When teachers provide appropriate support for learners to get to the next level, removing that support as it's no longer necessary, they're providing scaffolding (Powell & Kalena, 2009, p. 244). While Vygotsky focused on children, adults, too, will become frustrated if they are not sufficiently supported with challenging learning (Mariani, 1997)…

Guiding questions using transformative learning theory:

\* How do open educators prevent the discomfort that obstructs student participation? If they do reach this point, how do we help them move forward?

\* Hannah felt her 'ideas and opinions were valued,' which made her 'feel comfortable sharing.' What strategies do you have for scaffolding student ownership of expertise, student confidence and active listening in a respectful classroom?

\* How do you provide structure to ameliorate the frustration caused by highchallenge learning while also enabling students to go beyond the learning intended by the teacher to create new knowledge?” (pp. 28-31)

**Essential Element:** This relates to the essential elements of adraogogy, Transformative Learning Theory, and educational taxonomy.

**Additive/Variant Analysis:** This comment is additive to my understanding of adult learning. The author contextualizes Mezirow with Vygotsky addressing a need for learning, including adult learning based on self-reflection, that of overcoming the gap between what a learner can do on his or her own and what they need the help of others to accomplish. While adult learning is self-directed, and as Mezirow has pointed out self-reflective, not every person may have what they need for learning within their resources. Mezirow would certainly recognize this as the concept of a disorienting dilemma refers to a personal experience that transcends self and certainly, is safe to assume his emphasis on reconciling their new perspective with social, cultural, and personal context includes other people. His view of learning assumes encounters with others who are different or situations that are different. However, the self-reflective and self-directive nature of adult learning does not translate to necessarily having all the knowledge, the ability to comprehend, and the skills to analyze new information and experience leading to a productive synthesis or changed perspectives. Sometimes we all need a little help from others.

**Contextualization:** The idea of scaffolding is intriguing as I consider pastoral leadership of congregations and individuals. Certainly, there is often a recognizable gap between what a parishioner or congregation can achieve on their own and what they are not yet able to do and may only be able to do with the support of others. The entire premise for intentional transitional ministry is built on the recognition that sometimes congregations need a little outside expertise help. This is compounded by the realization of Mezirow and others that adult learning often requires a dilemma that brings accompanying anxiety. The author is correct that when a learning community begins to wrestle with contradictions and contrasts between their individual experiences and new ones or the experiences of others, new knowledge can be created. But this is often not just a contrast, but an anxiety-producing dilemma. Not everyone has the individual resources to navigate such a dilemma. Thus, group collaboration and supportive leadership become essential lest the learner retreat from new learning. The anxiety must be managed. Here I find the author’s three questions quite useful for pastoral leadership.

1. How do we prevent the discomfort that obstructs adults from participating in learning? I think perhaps the better question is how we manage and normalize the discomfort, reframe it as a sign of potential and appreciated growth rather than just as a potential loss, a perspective anxiety feeds.

2. What strategy is useful for the leader in this context to create a scaffold of support for the individual or group to help people feel comfortable participating in sharing their thoughts and experiences as well as listening to others, which can be dismantled as the work is accomplished?

3. How can I as a leader maintain openness to learning that transcends my training and experience for congregations, so that the congregation’s learning is truly collaborative, problem-solving, self-directed, grounded in sound Biblical and reasonable principles, so that not only the congregation but myself as a leader can experience changed perspectives and growth?

**Source Seven:** Tondok, M. S., Suryanto, S., & Ardi, R. (2022). Intervention program to reduce religious prejudice in education settings: A scoping review. *Religions*, *13*(4), 299. <https://doi.org/10.3390/rel13040299>

**Comment 10:**

**Quote/Paraphrase:**  “Changes in perspective through the interfaith/interreligious dialogue intervention program occur through a transformative learning process (Pope and Nicolaides 2021; Wielzen and Avest 2017). Transformative learning cannot be separated from the concept of adult education proposed by Jack Mezirow (2003, 2006). The term “transformative learning” refers to the process of changing the frame of reference (mindset, thinking habits, meaning perspective) towards being more inclusive, open, reflective, and guiding action (Mezirow 2006).” (Tondok et al., 2022, p. 8) “Storytelling was effective in interfaith dialogue that encourages transformative learning in peace and harmony among various ethnicities and religions. Constructive storytelling in sharing emotions and feelings and experiences encouraged participants to build peace and harmony. Storytelling was a joint action among participants to create harmony and conflict resolution, especially in interfaith dialogue.” (p. 13)

**Essential Element:** This comment is related to the essential elements andragogy and Transformative Learning Theory.

**Additive/Variant Analysis:** This comment is additive to my understanding of adult learning. Mezirow presents transformative learning not only as a process that leads to a change of frameworks but as a learning process informed by countering variant experiences and information. Strong worldviews and frameworks are not always conducive to building “peace and harmony.” Faith-based worldviews can be especially resistant to change as change may be perceived as unfaithfulness. But people often do like to tell their stories and when allowed to do so, may be more open to hearing the stories of others. The observation that storytelling was effective in interfaith dialogue provides a useful tool for facilitating adult learning.

**Contextualization:** While most of my work now is not in an interfaith environment, I have served in such environments when deployed as a military chaplain in Iraq. Often relationship building with leaders in the Muslim community entailed not only listening to their stories of family and community but sharing our own stories which served to make the gap between our military forces and the local populace not as wide as before. Now, working in a congregational context, as a transitional leader and advisor, I often deal with congregations experiencing conflict between leadership and parishioner, between leaders themselves, between pastors and congregations, and many variations in between. Often by the time the transitional pastor arrives on the scene, having been summoned because the difficulty has risen to a fevered pitch, viewpoints have hardened, and dialogue is all but closed or repetitive. It occurs to me that storytelling may be a good first step here to help open renewed conversation and learning within conflicted adult communities such as conflicted congregations. What has worked well within an interfaith environment with different worldviews should also work well within a same-faith environment operating with different, set, and conflicted viewpoints.

**Source Eight:** Misawa, M., & McClain, A. (2019). A mentoring approach: Fostering transformative learning in adult graduate education. *Journal of Transformative Learning*, *6*(2), 52–62

**Comment 11:**

**Quote/Paraphrase** “Jack Mezirow, who was a faculty member in Teacher’s College at Columbia University and theorized transformative learning in 1975, believed that individuals must experience a disorienting dilemma and then engage in critical reflection and discourse during the transformative learning process… Dirkx (2006) claims that these dilemmas can be the product of ordinary and everyday experiences.” (Misawa and McClain, 2019, p. 52) “Fostering critical thinking skills is a pivotal part of developing autonomous thinking that promotes a self-directed process of expanding one’s consciousness (Wade, 1998), and this is brought about through a cyclical process of transformative learning (Mezirow, 1997)…Educators have expressed the importance of developing authentic environments and relationships in graduate education are vital to creating opportunities for transformative learning (Cranton, 2006, 2011, 2016; Stevens-Long, Schapiro, & Mcclintock, 2012).” (p.53)

**Essential Element:** This comment is related to the essential elements of andragogy and Transformative Learning Theory. The comment addresses not only the potentially transformative of adult learning but relates it also to self-directedness and flexible learning environments which is stressed in theory of andragogy.

**Additive/Variant Analysis:** This comment is additive to my understanding of adult learning. Mezirow’s focus on a disorienting dilemma could give the impression that such a dilemma must amount to some form of crisis. The point that “ordinary and everyday experiences” can create a dilemma suggests that this learning process does not have to require a precipitous critical event but could be a smaller incongruence or even learning based on an awareness of accumulated incongruences. Also, it is important to note that people can develop the skills to be self-directed in their learning, even when encountering new and challenging experiences and viewpoints. It may be in our nature to seek confirmation bias, to reinforce our worldview, but we can learn to see value in challenging our presuppositions.

**Contextualization:** Socrates summed up all philosophy with the phrase, “Know thyself.” Adult learning has also been described as life-long learning or a life of learning. I believe the author makes a valuable point here that we see put into practice at Omega Graduate School. When I first came to the school, and it was still called Oxford Graduate School, I remember Dr. Greene telling me that the program was not to teach us what to learn but how to learn. As adults we not only learn how to learn but we learn how to live as those who learn. It becomes not just a self-directed but a self-chosen process, a process one commits to for the sake of understanding the truth. Jesus taught the value of truth and that He leads his people into truth. In the Lutheran tradition, it is understood the old sinful Adam remains active in our lives even after we come to faith and as Luther described it in his Smaller Catechism, must be drowned daily through reflecting on our baptism. In this way, adult learning for a Christian, though self-directed, is ever in response to God’s action in our life creating and building faith as we seek to understand God’s viewpoint and the truth of things. There is a danger in a self-directed process if that self-direction is coming from our sinful nature. But Christian discipleship is certainly a self-oriented process as it is about growing the new Adam, the life of sanctification. Within the church, a vital, or life-giving, environment for transformative learning will be thoroughly infused with God’s Word. Fostering critical thinking skills accords well with the Scriptural theme of self-examination seen through the Pauline epistles as we intentionally engage our sinful nature in light of God’s Word. Cultivating a skill set and habitual approach to Scripturally examine our daily and ordinary lives as we encounter others, and we observe ourselves encountering others can serve to upset sinfully held viewpoints in favor of godly transformative learning.

**Source Nine:** Fenwick, Tara., & Tennant, Mark. (2020). *Understanding adult learners*. In Griff Foley (Ed.) *Dimensions of adult learning: Adult education and training in a global era* (1st ed.). Routledge. <https://ereader.perlego.com/1/book/1645884/12>

**Comment 12:**

**Quote/Paraphrase:** “As learners reflect on their lived experience, they actively interpret what they see and hear, emphasizing aspects of greatest personal interest or familiarity, and so construct and transform their unique knowledge. This means that in a classroom of adults listening to a presentation, each learner will most likely construct a very different understanding of what they are hearing (which may or may not approximate what the speaker thinks she/he is saying!)…all reflective learning theories share one central belief: as learners we construct, through reflection, a personal understanding of relevant structures of meaning derived from our actions in the world…In the everyday process of ‘meaning-making’ and problem-solving, reflective theories explain that we learn procedural knowledge (how to do things or solve problems) and propositional knowledge (what things mean) through reflecting on experiences…But in critical reflection people question how they framed the problem in the first place. Even if no apparent problems exist, the thoughtful practitioner questions situations, asking why things are the way they are, why events unfold in the way they do. People also reflect critically to problematise their own actions, asking: Why did I do what I did? What beliefs inform my practice, and how are these beliefs helping or hindering my work?...Mezirow’s (1991) theory of ‘transformative learning’ is based on a tri-level concept of critical reflection on experience. When adults encounter a disorienting dilemma or undesirable outcome, reflection is often triggered. Reflection on the content of the experience (What happened?) or process they employed (How did it happen?) may promote procedural learning. But when reflection challenges the very premises undergirding problem-solving processes (What’s wrong with how I am seeing what happened and how it happened?), we move toward a transformation in our world views. Mezirow has continued to argue, throughout the exhaustive debates around his theory (see Taylor, 1998), that this process of vigorous critical reflection transforms our ‘meaning perspectives’ to become more ‘inclusive, differentiating, permeable, critically reflective, and integrative of experience’ (Mezirow 1991: 14)…Critical reflection is also fundamental to popular education or the forms of learning that Allman (2001) calls revolutionary critical education. Unlike the individualistic theory of Mezirow, both are rooted in the collective. Through critical reflection combined with social action, groups develop new awareness of social inequities and oppressions they had taken for granted, and envision more just formations (see chapters 3 and 15). These approaches celebrate praxis—the integration of critical reflection with action—and support a shift in focus to practice.” (Tara Fenwick et al., 2020)

**Essential Element:** This comment is related to the essential elements of andragogy, Transformative Learning Theory, and Educational Taxonomy.

**Additive/Variant Analysis:** This comment is variant to my understanding of appropriate adult learning. This longer citation follows a logical development of Mezirow and other reflective learning theories that assume the value of an end state aligned with postmodern and critical political theory that the supreme goal of adult learning is permeability and inclusivity as if there is necessarily something wrong or at least incomplete with well-formed world views, such as a worldview informed by Holy Scripture.

**Contextualization:** Learning for the sake of comprehending the truth resulting in ethical behavior toward one’s neighbor is always desired. As noted in previous entries, there is much in Mezirow that can be incorporated into a view of adult learning as Christian discipleship. But the desired end state of his approach is not necessarily congruent with the Christian faith for it strongly suggests that the highest learning is to come to a position of inclusivity built on having critically torn down all specifics in one’s worldview. The end state appears to be built on the presupposition that tolerance and respect for others are ultimately built on the realization that no worldview can claim superiority or correspondence with truth.

The author begins this selection by recognizing the normal default learning experience is to emphasize the “aspect of greatest personal interest or familiarity…” As noted in the previous comment (#11) self-reflection has value in the life of Christian learning as a process for “meaning making” and increasing “personal understanding” both of ourselves and our actions and their congruence or incongruence with God’s Word. The author then moves to critical reflection as a step beyond self-reflection in which the learner develops the practice even when no problem or crisis exists of examining “…why things are the way they are.” This too can have a place of value within Christian discipleship. But this does not mean that the way things are is always wrong. Nor does it mean that if we encounter a different way it necessarily means that our way is wrong or that there is not right and wrong. The author notes that for Mezirow transformative learning (a higher state of learning) occurs when we question our worldviews and problem-solving techniques with the result that we become more “inclusive.” But such a transformation is not necessarily always a productive sign of spiritual progress. If we are led to abandon Scriptural teaching, this transformation toward inclusivity can hardly be defined as productive. From a worldly and postmodern/critical view it may be seen as such, but it can hardly be evaluated as such from the viewpoint of Scripture. There is much need for a “new awareness of social inequality and oppressions” but it hardly requires the elimination of one’s Christian worldview to develop it. Scripture would go so far as to suggest that only through seeing the other and the world through the eyes of Christ can we truly appreciate where self, community, and world have gone wrong. There is much in Mezirow and reflective learning theories to be commended, but the suggestion or application that ultimate learning requires rejection of the concept one’s worldview can correspond to reality, especially a Christian worldview, is not commendable.

**Source Ten:** Vaughan, Helen. (2022). *The handbook of transformational education*. WestBow Press. <https://www.everand.com/book/608223107/The-Handbook-of-Transformational-Education>

**Comment 13:**

Quote/Paraphrase: “Columbia University sociologist Jack Mezirow was the first to research the modern  concept and theory of transformation, and most work even today is either based on  his ideas or a reaction to them. Central to his work was what he referred to as phases of meaning. Mezirow’s phases of meaning:

• a disorienting dilemma

• a self-examination with feelings of guilt or shame

• a critical assessment of epistemic, sociocultural, or psychic assumptions

• recognition that one’s discontent and the process of transformation are shared  and that others have negotiated a similar change

• exploration of options for new roles, relationships, and actions

• planning a course of action

• acquisition of knowledge and skills for implementing one’s plan

• provisional trying of new roles

• building of competence and self-confidence in new roles and relationships

• a reintegration into one’s life on the basis of conditions dictated by one’s perspective” (p. 60-61)

**Essential Element:** This comment is related to the essential elements of andragogy, Transformative Learning Theory, and educational taxonomy. Mezirow opens insight into adult learning with his “phases of meaning.” This speaks to key andragogical themes such as experience, readiness to learn, a focus on the problem or task-oriented learning over abstract content, self-directed learning, flexible learning environments, and more. This helps us to understand that adult learning is more than just the acquisition of knowledge but deals with pragmatic comprehension and application aided by analysis, even critical self-analysis, and synthesis that will be evaluated as it is integrated into one’s beliefs and behavior within the learner’s context.

**Additive/Variant Analysis:** This comment is additive to my understanding of adult learning stimulating increasing awareness not only of how I learn but how those I seek to lead to increased insight within troubled congregations learn.

**Contextualization:**  While this comment is considerably basic as far as it goes for an introduction and overview of Mezirow, I find value in walking through recent interactive experiences with a congregation in turmoil. So this contextualization will be formatted as a bit of a case study considering my time with the congregation through the lens of Mezirow’s phases of meaning.

The congregation in question is a congregation in existence for 130 years with some of its current members direct descendants of the founding members. The median age of the congregation is sixty-seven with a third of the members over the age of eighty. The congregation’s regional supervisor described it as a church holding on so that its members could be buried in the church cemetery. Their pastor had recently quit with no notice. The congregation has experienced periods of conflict over the previous 40 years and most of its pastors have experienced a conflictual relationship with the congregation. Within the past two years, significant conflict had arisen within the lay leadership of the congregation with the previous pastor and between members themselves. Council and congregational meetings were known to quickly degenerate into shouting matches. A major source of anguish was the impression the church was on the verge of closing due to conflict and financial difficulties.

I was sent to the congregation by the District President (the equivalent of a bishop within the Roman and Episcopal systems) to serve a year to year and half interim transitional ministry. The purpose was to determine if the path forward was toward a peaceful and meaningful closer or securing another pastor.

The congregation even in a conflicted state had existed in a state of homeostasis with periods of conflict being expected. The congregational culture was built on the history of resilience as the congregation had endured the economic challenges of the early twentieth century as well as sending its men to two world wars. Half of the congregational members had arrived within the past five years, but almost all were denominational transplants from other places. There was a sense that the congregation would just go on because it always had. The disruptive conflict between the congregational president, likely a narcissist, and the pastor led to the ex-communication of the president by the church body when his antics became too much to be acceptable followed by the departure of the pastor as some leaders continued to scapegoat him lead to a “disorienting dilemma”. The critical issue of whether the congregation could remain open and even afford a new pastor with limited financial resources created a great deal of anxiety. It should also be noted that this anxiety had been exacerbated, but not rooted, in the recent Covid epidemic which had led to some members staying away as well.

In the first months, general surveys of the congregational members were conducted as well as in-person interviews with leaders, members, and surrounding pastors as well as community leaders to ascertain the lay of the land. Having identified the information, in the previous paragraphs, a process for intervention was constructed and implemented. Ironically, it was not that dissimilar to Mezirow’s phases.

First, I engaged with members as individuals and with the various groups within the congregation to address the feelings associated with the event. Some were angry, most were to some degree afraid, and some did feel remorse for not supporting their pastor more. The older members, including three patriarchs of the congregation, were mostly entrenched and resistant to learning. But most of the other older members and the few younger folks were open to understanding how they could do better.

A learning team was formed. A learning team consists of motivated people assessed to have an openness to learning with at least some experience and skill that can be brought to bear on considering a way forward. The first part of the time with the learning team is spent in providing tools, normally congregational systems understanding as taught by Peter Steinke, which utilizes family systems theory and treats the congregation as an emotional system. The latter part of the time of the learning team is self-directed learning and consideration as they suggest avenues for problem-solving.

This learning team did progress in much the same way as Mezirow’s phases. After discussing their fears and doubts they moved to critically examine what had happened to better understand the system dynamics that had led to the problem. They came to understand the negative role of triangulation, scapegoating, and how anxiety reduces problem-solving capability giving rise to anger and power dynamics. They began to understand this was not a new development but had been a part of the congregational culture to some degree for the past forty years. They also began to understand that the existing dynamic of giving a few people, namely three patriarchs over eighty, too much influence and veto power was not conducive to forward progress. They began to explore new roles and relationships for a broader base of leadership within the congregation and encouraging new people to step into formal leadership roles such as congregational president and elder. Beyond this, a course of action was planned to help the internal conflict, consider the financial situation, and cultivate a culture of care for one another that could be leveraged for future outreach. They learned about crisis management, systems dynamics, and conflict resolution and implemented these new skills.

The learning team began to exercise influence within the congregation both in formal and informal ways. Formally, they had a voice at council and congregational meetings. Informally they had conversations with other church members in day-to-day interactions. The first notable result was the reduction of conflict within formal meetings. Meetings began to stabilize following a form of discussion. The members of these meetings served as their own immune system (a congregational systems concept) when a certain few tended to want to revert to shouting and arguing. More quickly than I expected these outbursts faded away and meetings became productive. This builds a sense of competence within the congregation and self-confidence. The anxiety not only began to fade, it was replaced with a budding optimism by the time the learning team completed its formal work.

The learning had taken root. Self-directed, the congregational members began to create new structures. They created a care and concern team moving away from the language of “committee” to “team.” They began to focus on reaching out to former alienated members and shut-ins as well as creating events for fellowship and relationship building within the congregation. One direct result was the financial picture improved. Some members returned as the congregation became a safer more positive place to be and facilitated by the fading of the Covid epidemic. Given increased.

It was decided the course for the future was to secure permanent pastoral care as the closure of the congregation would be premature. Given the older nature of the membership, the congregation was encouraged to enter into a partnership with a fellow congregation in town where they would share the services of a pastor, their pastor having recently announced retirement opening the window of opportunity. Notably, this is a congregation with which they had been deeply conflicted for twenty years. This conflict was still important to some of the older members. But their growth in understanding conflict and anxiety as well as their budding optimism transcended these barriers, and a successful partnership was formed.

The addition of Mezirow’s framework to my toolbox provides a valuable process for understanding not only what transpired within the congregation but also how it can be replicated within other congregations. It assimilates well with congregational system theory based on family systems theory.

**Comment 14:**

**Quote/Paraphrase** “James Loder offered an academic perspective on transformational education from a Christian perspective. The purpose of Christian education is to construct a Christian style of life in response to the work of the Spirit, in which each domain of human action learns to intentionally participate in the Spirit’s redemptive initiative to conform human reality to the nature of Christ. James Loder presents a Christian perspective that emphasizes the work of God’s Spirit in the process of transformation. Stages of Loder’s transformational education model:

• contextually situated conflict (an ongoing opposition that drives the person to  find an adequate solution)

• scanning (contemplative scanning) immersed exploration of possible connections and combinations of meanings

• insight (bringing into cognitive association two factors previously thought to be unrelated)

• release and redirection of energy

• interpretation and verification

• revisit the new insight to make sure it is coherent (e.g., blogging, debate)” (p. 61)

**Essential Element:** This comment relates to the essential elements of andragogy, Transformative Learning Theory, and educational taxonomy.

**Additive/Variant Analysis:** This comment is additive to my understanding of adult learning as it adds additional layers to understanding Mezirow’s framework from a Christian perspective.

**Contextualization:** Loder’s structural process has a distinct similarity with Mezirow though simplified. Recognizing that a “contextual situated conflict / disorienting dilemma” is a major impetus to learning, I am not sure all adult learning is predicated upon this necessity. It occurs that learning can also be an expansion of an existing horizon (Gadamer) in the encounter with new and different horizons. It is likely that all adult learning is not disorienting at first but can be complementary.

Loder helps remind us that adult learning in response to the Holy Scripture is different from learning from worldly experiences. A Christian is in a relationship with God and is indwelled with the Holy Spirit who works through the Scripture not only to teach doctrine but to work out the process of sanctification and transformation of the original sinful person. Loder does focus on experience, indeed sees learning as predicated upon engagement with one’s experience, but sees God at work in consideration through the lens provided by Holy Scripture. Thus, the insight gained is not from experience alone or even from others but is gifted by the Holy Spirit Himself as He provides an informed perspective that transcends the abilities of our sinful selves. Thus, our interpretation and learning are verified against the veracity of Scripture. I also appreciate the importance here that Loder places on the assimilation of such learning through revisiting it to make sure it is congruent with one’s Christian faith, as he says coherent, but means it makes sense in relationship with what we know not just from our previous experience but from our faith informed by Scripture.

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